

APPENDIX A - DEFINITION OF TERMS

(Include INPUT's standard *Definition of Terms* appendix for delivery mode reports)

APPENDIX B - FORECAST AND DATA BASE RECONCILIATION

Exhibits B-1 and B-2 offer the 1991-1997 market forecast by submode and platform.

Exhibits B-3 and B-4 provide INPUT's reconciliation of the 1991 and 1996 U.S. market forecasts noted in the 1991 and 1992 Systems Software Product reports.

Market Forecasts - The total market for 1991 and 1992 have been adjusted slightly upward, as has the 1992-1997 five year forecast. Growth from 1991 to 1992 was 11%, up 1% from the 1990-1991 figures, and the 1992-1997 five year forecast now indicates a 14% CAGR, as opposed to the 12% noted for the period 1991-1996. These changes reflect the anticipated beneficial effects of an improved economy and a return to modest growth in the business sector.

Platform figures show the mainframe system software products market holding steady at a 10% 5-year CAGR, while the minicomputer market has grown slightly at 11% (versus 10% in the 1991 report) and the workstation/PC market is now at a 22% CAGR versus a 19% in the 1991 document - both 10% increases over the 1991 numbers.

Forecast Reconciliations - The market reconciliations noted in Exhibits B-3 and B-4 indicate variances for both platform and submode values for the 1991 market of from 2% to 7%, with the systems control products running 6% below and both other submodes running 6% greater than 1991 estimates. The figures projected for 1996 show a greater range in variances from last year's report, and reflect the cumulative effect of a return to moderate domestic economic growth. Although 1996 yearly values in the two reports vary from -22% to 35%, the five year CAGR (1991-1996) shows variations of only 1% to 4%, a result of the larger percentage variations expected from changes to smaller base values.

SYSTEMS SOFTWARE PRODUCTS
Market Forecast by Submode
1991-1997
(\$ Millions)

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DELIVERY MODE	Growth		1992 (\$)	1993 (\$)	1994 (\$)	1995 (\$)	1996 (\$)	1997 (\$)	CAGR
	1991 (\$)	91-92 (%)							92-97 (%)
DELIVERY MODE TOTAL --	18,370	11%	20,480	23,140	26,470	30,075	33,987	38,580	14%
Systems Control Products	6,405	10%	7,062	7,823	8,837	9,924	11,045	12,340	12%
- Mainframe	2,810	3%	2,894	2,995	3,135	3,285	3,441	3,604	4%
- Minicomputer	2,050	10%	2,255	2,480	2,728	3,000	3,300	3,632	10%
- Workstation/PC	1,545	24%	1,913	2,358	2,974	3,639	4,304	5,104	22%
Operations Management Tools	4,350	11%	4,820	5,457	6,257	7,130	8,125	9,260	14%
- Mainframe	2,334	10%	2,573	2,897	3,300	3,680	4,114	4,690	13%
- Minicomputer	1,485	7%	1,593	1,738	1,915	2,103	2,314	2,637	11%
- Workstation/PC	531	23%	654	822	1,042	1,347	1,697	1,933	24%
Applications Development Tools	7,615	13%	8,598	9,850	11,376	13,021	14,817	16,980	15%
- Mainframe	3,385	11%	3,770	4,220	4,720	5,280	5,910	6,615	12%
- Minicomputer	2,535	11%	2,818	3,185	3,681	4,123	4,507	5,010	12%
- Workstation/PC	1,695	19%	2,010	2,445	2,975	3,618	4,400	5,355	22%

SYSTEMS SOFTWARE PRODUCTS
Market Forecast by Platform
1991-1997
(\$ Millions)

Copyright 1992 by INPUT
12/15/92

	Growth								CAGR
Delivery Mode	1991 (\$)	91-92 (%)	1992 (\$)	1993 (\$)	1994 (\$)	1995 (\$)	1996 (\$)	1997 (\$)	92-97 (%)
Mainframe	8,529	8%	9,237	10,112	11,155	12,245	13,465	14,909	10%
- Systems Control Products	2,810	3%	2,894	2,995	3,135	3,285	3,441	3,604	4%
- Operations Management Tools	2,334	10%	2,573	2,897	3,300	3,680	4,114	4,690	13%
- Applications Development Tools	3,385	11%	3,770	4,220	4,720	5,280	5,910	6,615	12%
Minicomputer	6,070	10%	6,666	7,403	8,324	9,226	10,121	11,279	11%
- Systems Control Products	2,050	10%	2,255	2,480	2,728	3,000	3,300	3,632	10%
- Operations Management Tools	1,485	7%	1,593	1,738	1,915	2,103	2,314	2,637	11%
- Applications Development Tools	2,535	11%	2,818	3,185	3,681	4,123	4,507	5,010	12%
Workstation/PC	3,771	21%	4,577	5,625	6,991	8,604	10,401	12,392	22%
- Systems Control Products	1,545	24%	1,913	2,358	2,974	3,639	4,304	5,104	22%
- Operations Management Tools	531	23%	654	822	1,042	1,347	1,697	1,933	24%
- Applications Development Tools	1,695	19%	2,010	2,445	2,975	3,618	4,400	5,355	22%

12/28/92

(\$ Millions)

	1991 Market				1996 Market				91-96	91-96
	1991	1992	Variance From		1991	1992	Variance From		CAGR	CAGR
	Report	Report	Report	Report	Report	Report	Report	Report	per data	per data
	(Fcst)	(Fcst)	(Fcst)	(Fcst)	(Fcst)	(Fcst)	(Fcst)	(Fcst)	91 RPT	92 RPT
Delivery Mode	(\$M)	(\$M)	(\$M)	(%)	(\$M)	(\$M)	(\$M)	(%)	%	%
=====										
Total Systems Software										
Products Market	18,100	18,370	270	1%	31,700	33,987	2,287	7%	12%	13%
=====										
Systems Control										
Products	6,800	6,405	-395	-6%	11,100	11,045	-55	-1%	10%	12%
-Mainframe	3,000	2,810	-190	-6%	4,400	3,441	-959	-22%	8%	4%
-Minicomputer	2,200	2,050	-150	-7%	3,500	3,300	-200	-6%	10%	10%
-Workstation/PC	1,600	1,545	-55	-3%	3,200	4,304	1,104	35%	15%	23%
Operations										
Management Tools	4,100	4,350	250	6%	7,900	8,125	225	3%	14%	13%
-Mainframe	2,200	2,334	134	6%	4,000	4,114	114	3%	13%	12%
-Minicomputer	1,400	1,485	85	6%	2,250	2,314	64	3%	10%	9%
-Workstation/PC	500	531	31	6%	1,650	1,697	47	3%	27%	26%
Applications										
Development Tools	7,200	7,615	415	6%	12,700	14,817	2,117	17%	12%	14%
-Mainframe	3,200	3,385	185	6%	4,950	5,910	960	19%	9%	12%
-Minicomputer	2,400	2,535	135	6%	3,750	4,507	757	20%	9%	12%
-Workstation/PC	1,600	1,695	95	6%	4,000	4,400	400	10%	20%	21%

Dear Colleague:

Attached is the 1992 Market Analysis Program (MAP) report, *U.S. Systems Software Products, 1992-1997*. It provides a current assessment of the events and issues driving the systems software products marketplace, and offers INPUT's forecast of the market size for such services.

This hardbound copy should be filed with INPUT's U.S. delivery mode reports, since together with those reports and the industry reports filed in INPUT's binders, they provide a total assessment of the United States market for information services.

I am certain that you will find this report to be both informative and useful, and welcome any comments that you have on this document, or any of INPUT's publications.

Sincerely,

R. Dennis Wayson
Vice President

MASSZTL.DOC

1990

- AR -

Revenue

Intergraph -

REYNOLDS

Schlumberger -

TRIAD Systems

GERBER Scientific

ASK

Mentor 435,185

TURN

REVENUE

1990

1,044.6

(in millions)

595,266

5,306,217

144,687

367,189,000

207,486

1990

TOTAL

REVENUE

~~VARS RESET~~

~~Arto Des~~

1
6.3
1.7
8

4.2
1.8
80

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LET IT
END!**
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1 Industry: (check one only)

- 01 ☐ Manufacturers (other than
compute/Communications)
02 ☐ Financial/Banking
03 ☐ Insurance
04 ☐ Real Estate
05 ☐ Healthcare Services
06 ☐ Legal
07 ☐ Hospitality
08 ☐ Retail/Wholesale Trade/
Business Services
09 ☐ Transportation
10 ☐ Utilities
11 ☐ Education

2 What is your job function? (check one only)

- 12 ☐ Process Industries (Mining/Construction/
Petroleum Refining/Agriculture/Forestry)
13 ☐ Government, State/Local
14 ☐ Government, Federal
15 ☐ Military
16 ☐ Aerospace
17 ☒ Consultants (Independent)
18 ☐ Carriers
19 ☐ Interconnects
20 ☐ Manufacturers
(Computer/Communications)
21 ☐ VAR/AV/AVM Systems Houses
22 ☐ Distributors, Computer Related
23 ☐ Distributors, Communications Related
24 ☐ Other

3 My responsibilities include: (check one only)

- 1 ☐ LANs/Internetworking/WANs
2 ☐ LANs/Internetworking 3 ☐ LANs
3 ☐ WANs 4 ☐ None
5 ☐ None
6 ☐ None
7 ☐ None
8 ☐ None
9 ☐ None

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6 Check all that apply in columns A and B:

A. I am involved in the purchase of the following products/services

B. I plan to purchase the following products/services in the next year.

Involved in purchase

A LOCAL-AREA NETWORKS

- 01 ☒ Local-Area Networks
02 ☐ LAN Servers
03 ☐ LAN Operating Systems Software
04 ☐ SuperServers
05 ☐ Data Base Servers (Oracle, Sybase, etc.)
06 ☐ Terminal Servers
07 ☐ LAN Services
08 ☐ LAN Storage Devices (optical, tape, disk, etc., including backup systems)
09 ☐ Network Test Equipment
10 ☐ Hubs
11 ☐ Cables, Connectors, Baluns
12 ☐ UPS
13 ☐ Network Adapter Boards
14 ☐ Peer-to-Peer LANs
15 ☐ Wireless LANs
16 ☐ SNMP Network Management
17 ☐ ATM (Asynchronous Transfer Mode)

B INTERNETWORKING

- 18 ☐ Bridges
19 ☐ Routers
20 ☐ Gateways
21 ☐ Bridge/Routers
22 ☐ Hubs
23 ☐ Intelligent Hubs
24 ☐ Communications Servers

A COMPUTERS/PERIPHERALS

- 25 ☐ Micro/PCs
26 ☐ Minis
27 ☐ Mainframes
28 ☐ Pen-Based
29 ☐ Laptops
30 ☐ Workstations
31 ☐ Image Processing Workstations
32 ☐ Front-End Processors
33 ☐ Terminals
34 ☐ Printers
35 ☐ Cluster Controllers
36 ☐ Fax Machines
37 ☐ X-Terminals

B SOFTWARE/APPLICATIONS

- 38 ☐ Network Management
39 ☐ Micro to Mainframe
40 ☐ Security
41 ☐ Communication/Terminal Emulation
42 ☐ Word Processing
43 ☐ Operating Systems
44 ☐ Business Applications (Finance/Mfg/HR)
45 ☐ Applications Development
46 ☐ Data Base Management
47 ☐ Spreadsheet
48 ☐ Groupware
49 ☐ EDI
50 ☐ E-Mail
51 ☐ Windows/Graphical User Interface
52 ☐ 4GL/Development
53 ☐ Multimedia
54 ☐ Graphics
55 ☐ Utilities

A B WIDE-AREA NETWORK EQUIP/SERVICES

- 56 ☐ Modems (9.6K bps and over)
57 ☐ Modems (under 9.6K bps)
58 ☐ T-1
59 ☐ T-3
60 ☐ Fractional T-1
61 ☐ Data Switches
62 ☐ SDMS
63 ☐ ATM (Asynchronous Transfer Mode)
64 ☐ Matrix Switches
65 ☐ Packet Switches
66 ☐ Protocol Converters
67 ☐ Diagnostic/Test Equipment
68 ☐ DSU/CSUs
69 ☐ Microwave
70 ☐ Fax Boards/Modems
71 ☐ VSAT
72 ☐ Fiber Optic
73 ☐ Satellite
74 ☐ ISDN
75 ☐ PBXs (over 1000 lines)
76 ☐ PBXs (under 1000 lines)
77 ☐ Automatic Call Distributors
78 ☐ Voice Messaging Systems
79 ☐ Video Conferencing Systems
80 ☐ Voice Response/Processing

B. Involvement (check all that apply)

- 81 ☐ Switched Voice
82 ☐ Dedicated Leased Line
83 ☐ Switched Data
84 ☐ Centrex
85 ☐ E-Mail/On-Line Information
86 ☐ Image Processing
87 ☐ Audio Teleconferencing
88 ☐ Local Services
89 ☐ WATS-MTs
90 ☐ International
91 ☐ Virtual Networks
92 ☐ Frame Relay
93 ☐ Value Added Services
94 ☐ None of the above (1-93)

4 What is the total number of sites for which you have purchasing influence? (check one only)

- 1 ☐ 100+ 2 ☐ 50-99 3 ☐ 20-49
4 ☐ 10-19 5 ☐ 2-9 6 ☐ 1
7 ☐ None

5 What is your scope and involvement in purchasing decisions for network products & services for your enterprise?

- A. Scope (check one only) B. Involvement (check all that apply)
1 ☒ Corporatewide 2 ☒ Recommend/
3 ☒ Multienterprise (consultants) 4 ☒ Approve
5 ☒ Departmental 6 ☒ Evaluate
7 ☐ None (A or B)

7 What is the total number of

1 ☒ 07 Novell IPX/SPX

LAN ENVIRONMENT

8 For which areas outside of the

1 ☒ Europe 4 ☐ Australia

20 MAASZ

INPUT*

1280 Villa Street, Mountain View, CA 94041 • Tel. (415) 961-3300 • VM 211
Fax (415) 961-3966LAURA HAGGERTY
Program Manager,
Information Services
Vendor Analysis Program

1991

12/8/92

TOTAL REVENUES

Chase

Please call Beth
Mettugh with the most
recent revenue figures for
the following companies:
called - 1 - Intergraph - 1,200,000^{fill} (AR)
1991-589.3 - 2 - Reynolds + Reynolds (AR)
1991 400.1^(?) - 3 - Mentor graphics (AR)
4 - Schlumberger
91 137.5 - 5 - Triad Systems (AR)
91 268.5 - 6 - Gerber Scientific (AR)
92 432m ~~to M&M~~
~~7 - The ASK Group~~

This should be charged to the
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A

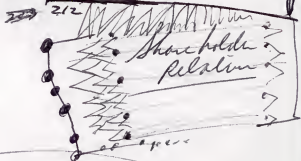
277 Avenue NY

91 PR

212 - 350 9400

1991 -

AR



Take -

1991 -

6

1. 195 million

1 or 2

Family System (VAPS)

plus telephone